

Role Management in MSPbots

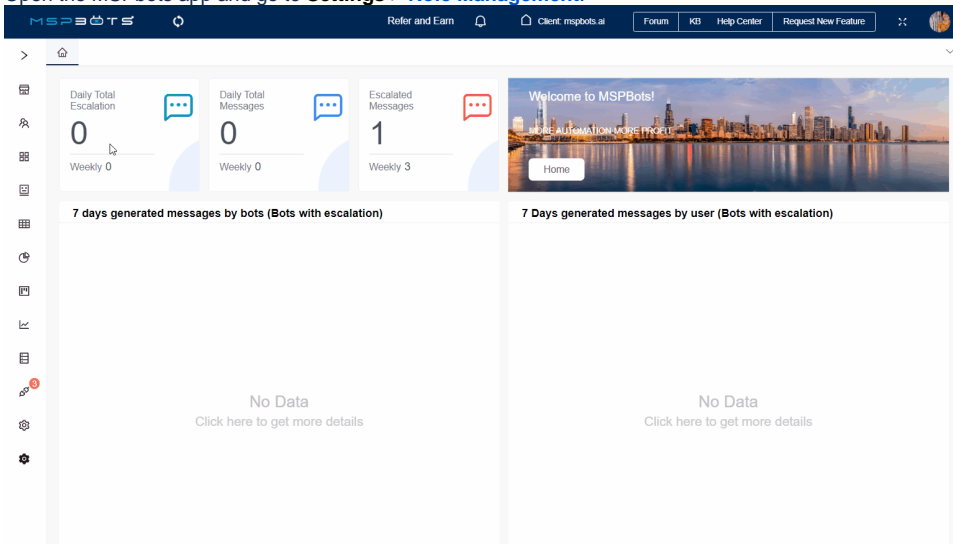
The Role Management section in the MSPbots app is where admins can create the roles that can access MSPbots assets. Here, you can assign and limit the scope of access for each role and delete or edit existing ones.

What's in this article:

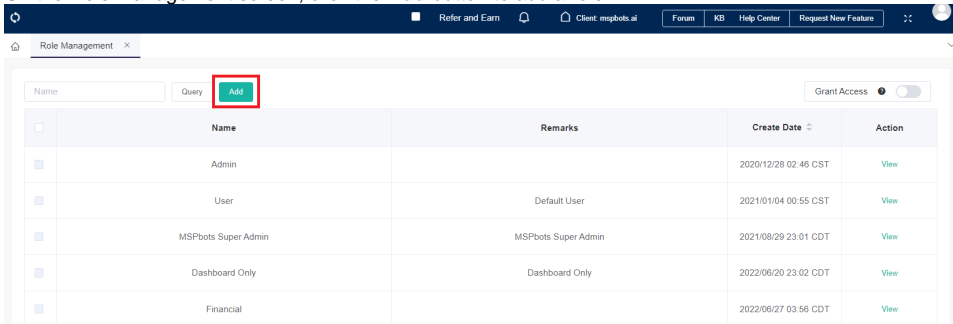
- [How to create a role in Role Management](#)
- [What other actions are available in Role Management?](#)
- [Role Types in Role Management](#)
- [How to give accounts access to your data](#)

How to create a role in Role Management

1. Open the MSPbots app and go to **Settings > Role Management**.



2. On the Role Management screen, click the **Add** button to add a role.



3. In the Add window, provide the following:

- **Name** - Enter a unique role name.
- **Remarks** - Remarks to describe the role.

Add ×

* Name

Name

Remarks

Remarks

Dashboard Only ☐

Attendance Only ☐

Menu Scope Assets Scope

☐ Show all permission

4. **Dashboard Only** - You can create default Dashboard Only roles with different asset scopes for the Dashboard Only menu scope by toggling the switch.

- When you turn on the "Dashboard Only" switch, the **Menu Scope** will automatically be filled in as "Dashboard Only" and cannot be modified.
- Assets related to dashboards will be automatically added in the **Asset Scope**. You only need to adjust the asset scope based on your actual needs. By assigning different asset scopes to every "Dashboard Only" role, you can precisely control the assets that each user can access based on their needs and permission levels. This ensures that each user can only view and handle dashboard assets related to their work.

Add
×

* Name

Remarks

Dashboard Only
☒

Attendance Only
☐

Menu Scope
Assets Scope

☐ Show all permission
☐ UpgradeSql
☐ Dashboard Edit
☒ MarketPlace
☐ Boolean Widget Menu (not use)
☒ NextTicket Dashboard View/List View
☐ PeerGroup
☐ Apps
☐ Bots
☒ Dashboards
☐ Scorecards
☒ Widgets
☐ KPIs
☐ Datasets
☐ Integrations
☐ Attendance
☐ Financial Dashboard
☐ New Feature Request
☐ Settings

5. **Attendance Only** - You can create default Attendance Only roles with different asset scopes for the Attendance Only menu scope by toggling the switch.

- When you turn on the "Attendance Only" switch, the **Menu Scope** will automatically be filled in as "Attendance Only" and cannot be modified.
- Assets related to attendance will be automatically added in the **Asset Scope**. You only need to adjust the asset scope based on your actual needs. By assigning different asset scopes to every "Attendance Only" role, you can precisely control the assets that each user can access based on their needs and permission levels. This ensures that each user can only view and handle attendance assets

related to their work.

Add

×

* Name

Remarks

Dashboard Only ☐

Attendance Only ☒

Menu Scope Assets Scope

- ☐ Show all permission
 - ☐ UpgradeSql
 - ☐ Dashboard Edit
 - ▶ ☐ MarketPlace
 - ☐ Boolean Widget Menu (not use)
 - ☒ NextTicket Dashboard View/List View
 - ▶ ☐ PeerGroup
 - ▶ ☒ Apps
 - ▶ ☐ Bots
 - ▶ ☒ Dashboards
 - ☐ Scorecards
 - ▶ ☐ Widgets
 - ☐ KPIs
 - ▶ ☐ Datasets
 - ▶ ☐ Integrations
 - ▶ ☐ Attendance
 - ▶ ☐ Financial Dashboard
 - ☐ New Feature Request
 - ▶ ☐ Settings



- The "Attendance Only" switch is similar to the "Dashboard Only" switch, and these two switches are mutually exclusive, meaning you can only select one at a time or not select either one.
- You can edit the "Dashboard Only" and "Attendance Only" switches when creating a new role, but they are disabled when editing existing roles.

6. Next in the Add window, click **Menu Scope** and select the sections in the MSPbots app that the role can access.

Add

×

* Name

Remarks

Dashboard Only ☐

Attendance Only ☐

Menu Scope

Assets Scope

- ☐ Show all permission
 - ☐ UpgradeSql
 - ☐ Dashboard Edit
 - ▶ ☐ MarketPlace
 - ☐ Boolean Widget Menu (not use)
 - ☐ NextTicket Dashboard View/List View
 - ▶ ☐ PeerGroup
 - ▶ ☐ Apps
 - ▶ ☐ Bots
 - ▶ ☒ Dashboards
 - ☐ Scorecards
 - ▶ ☐ Widgets
 - ☐ KPIs
 - ▶ ☐ Datasets
 - ▶ ☐ Integrations
 - ▶ ☐ Attendance
 - ▶ ☐ Financial Dashboard
 - ☐ New Feature Request
 - ▶ ☐ Settings

7. Next, click **Assets Scope** and select the assets that will be accessible to the role.

Add ×

* Name

Remarks

Dashboard Only ☐

Attendance Only ☐

Menu Scope

Assets Scope

Dashboards 7 Widgets 0 Dataset 0 Bots 0 Scorecards 0 Slicer 0 ➕ Add

Attendance
Attendance Dashboard gives visibility of the user's current attendance status and their in-progress ticket status. ×

Attendance Record
Record for all the attendance actions ×

Attendance Summary
Attendance Summary report focuses on displaying the totals hours worked and a separate summary report that can be exported to PDF, CSV and/or EXCEL for... ×

Attendance Summary by Employee
Attendance Summary by Technician report focuses on displaying the totals hours worked and a separate summary report that can be exported to PDF, CSV... ×

Team member
This page is for setting team and team members specifically for Attendance app only. ×

Users Work Schedule
Setup or review users' work schedule here, the schedule will be used by tech stat bot and attendance app. ×

PTO requests
A dashboard for Attendance APP request time off form for users. ×

For example, select **Widgets** to add it to the assets that will be available for the role. To add more assets to the widgets list,

a. Click ➕ Add. This will open the Assets Permission window.

Add ×

* Name

Remarks

Dashboard Only ☐

Attendance Only ☐

Menu Scope

Assets Scope

Dashboards 7 Widgets 0 Dataset 0 Bots 0 Scorecards 0 Slicer 0 ➕ Add

b. In the Assets Permission window, select the additional assets that the role can access.

Assets Permission ×

Widgets List

Sort Last Modified

Filter 1 Filters

Integration Group

Show all integration

Chargebee

ConnectWise Manage

My Favorites 0 My Widgets 1644 Template Widgets 2010

Tech Team Utilization
Shows the utilization of Tech Team for the past 1 business day
Linked Bots: 0 Linked Dashboards: 1 Custom ✕

CREATED: 2023/05/24 07:20:48 CDT UPDATE: 2023/05/13 04:39:17 CDT OWNER: ✕

KPI Weekly MRR
KPI Weekly MRR
Linked Bots: 0 Linked Dashboards: 1 Custom ✕

CREATED: 2023/03/06 02:43:31 CDT UPDATE: 2023/05/13 01:24:27 CDT OWNER: ✕

Weekly Solved Tickets - UI
Linked Bots: 0 Linked Dashboards: 1 Custom ✕

Total 1644 100/page < 1 2 3 4 ... 17 > Go to 1 Add Selected

c. Click **Add Selected**.

Assets Permission

Widgets List

Search

Sort: Last Modified

Filter: 1 Filters

Integration Group

Show all integration

Chargebee

ConnectWise Manage

Datto RMM

Dropbox

HubSpot

Jira Data Center

Kaseya BMS

OneDrive

OpenAI

Proteus Data

My Favorites 0

My Widgets 1644

Template Widgets 2910

Tech Team Utilization

Shows the utilization of Tech Team for the past 1 business day

Linked Bots: 0 Linked Dashboards: 1 Custom

CREATED: 2023/05/24 07:20:48 CDT UPDATE: 2023/06/13 04:39:17 CDT OWNER:

KPI Weekly MRR

KPI Weekly MRR

Linked Bots: 0 Linked Dashboards: 1 Custom

CREATED: 2023/03/06 02:43:31 CDT UPDATE: 2023/06/13 01:24:27 CDT OWNER:

Weekly Solved Tickets - UI

Linked Bots: 0 Linked Dashboards: 1 Custom

Total 1644 100/page < 1 2 3 4 ... 17 > Go to 1

Add Selected

Repeat to add more items to other assets like **Datasets** and **Scorecards**.

- ✓ You can add assets including all custom and template assets of the tenant.
- ✓ Adding a dashboard automatically adds all of the widgets and datasets included in the board. You do not need to set up these widgets or datasets again, and you will be able to access them directly.
- ✓ Adding a widget automatically adds the datasets included in it. You do not need to set the datasets again, and you will also be able to access them directly.

8. Click the **Confirm** button to save the changes.

Add

* Name Name

Remarks Remarks

Dashboard Only ☐

Attendance Only ☒

Menu Scope Assets Scope

Dashboards 7 Widgets 0 Dataset 0 Bots 0 Scorecards 0 Slicer 0 Add

Search

Attendance	Attendance Dashboard gives visibility of the user's current attendance status and their in-progress ticket status.	×
Attendance Record	Record for all the attendance actions	×
Attendance Summary	Attendance Summary report focuses on displaying the totals hours worked and a separate summary report that can be exported to PDF, CSV and/or EXCEL for...	×
Attendance Summary by Employee	Attendance Summary by Technician report focuses on displaying the totals hours worked and a separate summary report that can be exported to PDF, CSV...	×
Team member	This page is for setting team and team members specifically for Attendance app only.	×
Users Work Schedule	Setup or review users' work schedule here, the schedule will be used by tech stat bot and attendance app.	×
PTO requests	A dashboard for Attendance.APP request time off form for users.	×

Cancel Confirm

What other actions are available in Role Management?

You can also edit, delete, or view roles in the Role Management section of the MSPbots app. Search for a role in the search bar and click **Edit**, **Delete**, or **View** under the Action column.

Role Management

Name

Query

Add

Grant Access

	Name	Remarks	Create Date	Action
<input type="checkbox"/>	Internal Resources		2022/10/27 21:48 CDT	<div>EditDeleteView</div>
<input type="checkbox"/>	Client Portal Permission	This Role For Client Portal Login Use.	2022/10/19 06:27 CDT	<div>EditDeleteView</div>
<input type="checkbox"/>	Client Portal Permission	This Role For Client Portal Login Use.	2023/06/13 06:36 CDT	<div>EditDeleteView</div>
<input type="checkbox"/>	Member		2022/12/15 21:43 CST	<div>EditDeleteView</div>
<input type="checkbox"/>	Client Portal Permission	This Role For Client Portal Login Use.	2023/06/05 02:56 CDT	<div>EditDeleteView</div>

Total 35

10/page

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Role Types in Role Management

There are two role types in Role Management, which are Tenant-level and Platform-level roles.

- Tenant-level roles are those that allow viewing, editing, and deletion.

Role Management

Name

Query

Add

Grant Access

	Name	Remarks	Create Date	Action
<input type="checkbox"/>			2023/05/29 03:23 CDT	<div>View</div>
<input type="checkbox"/>			2023/06/06 02:10 CDT	<div>View</div>
<input type="checkbox"/>	Client Portal Permission	This Role For AAA Client Portal Login Use.	2022/10/18 22:32 CDT	<div>EditDeleteView</div>
<input type="checkbox"/>			2022/08/29 02:54 CDT	<div>EditDeleteView</div>
<input type="checkbox"/>	Client Portal Permission	This Role For ggg Client Portal Login Use.	2022/10/18 22:38 CDT	<div>EditDeleteView</div>
<input type="checkbox"/>	User to Hide Widget List		2022/06/06 03:26 CDT	<div>EditDeleteView</div>
<input type="checkbox"/>	UpGradeSQL		2022/10/18 01:26 CDT	<div>EditDeleteView</div>
<input type="checkbox"/>	Client Portal Permission	This Role For acc Client Portal Login Use.	2022/05/27 02:31 CDT	<div>EditDeleteView</div>
<input type="checkbox"/>	Client Portal Permission	This Role For steven wa Client Portal Login Use.	2022/10/18 22:36 CDT	<div>EditDeleteView</div>
<input type="checkbox"/>			2022/07/21 04:15 CDT	<div>EditDeleteView</div>

Total 64

10/page

<1234567>

Go to 2

- Platform-level roles only allow viewing operations, such as the admin role.

Role Management

Name

Query

Add

Grant Access

	Name	Remarks	Create Date	Action
<input type="checkbox"/>	Admin		2020/12/28 02:46 CST	<div>View</div>
<input type="checkbox"/>	User	Default User	2021/01/04 00:55 CST	<div>View</div>
<input type="checkbox"/>	MSPbots Super Admin	MSPbots Super Admin	2021/08/29 23:01 CDT	<div>View</div>
<input type="checkbox"/>	Dashboard Only	Dashboard Only	2022/06/20 23:02 CDT	<div>View</div>
<input type="checkbox"/>	Financial		2022/06/27 03:56 CDT	<div>View</div>
<input type="checkbox"/>	Financial	People who can access to company financial data.	2022/07/25 01:16 CDT	<div>View</div>
<input type="checkbox"/>	Attendance Only		2022/12/15 04:29 CST	<div>View</div>
<input type="checkbox"/>	Peer group		2023/02/05 22:28 CST	<div>View</div>
<input type="checkbox"/>	Billing only		2023/04/10 04:22 CDT	<div>View</div>
<input type="checkbox"/>	NextTicket Only		2023/04/12 21:55 CDT	<div>View</div>

Total 64

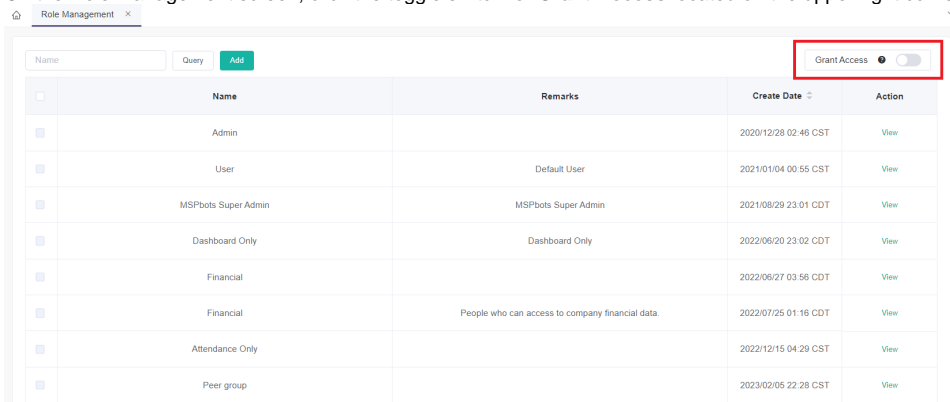
10/page

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Go to 1

How to give accounts access to your data

1. On the Role Management screen, click the toggle switch for **Grant Access** located on the upper right corner of the screen.



The **Grant Access** switch is disabled by default. Keeping it disabled will allow MSPbots to access your account without restrictions.

2. Click the **Grant Access** switch. This will open the **Grant Access** pop-up window.
 - a. Select an option from the **I want to give** dropdown list.
 - **All MSPbots** - Select this if you want to give access to all accounts of MSPbots.
 - **Single Users** - Select this if you want to give access to one or multiple accounts.

Grant Access

MSPbots is not allowed to access your account.

* I want to give

All MSPbots

* access of my data for next

3

Days

Grant

- b. Set a limit to the user's access by selecting an access duration from the **access of my data for next** dropdown list.
 - Select a number from **3, 5, 7, 10, 20, 30, 90**.
 - Select **Days** or **Hours**.

3. Click **Grant** to apply your settings.

Related Topics:

- [MSPbots User Roles and Descriptions](#)
- [When can I use the Financial Role](#)
- [Consultant Management Feature](#)
- [How to Grant Admin Access to Accounts in the MSPBots app](#)